

# **EXHIBIT G**

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ATTORNEYS & COUNSELORS

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DALLAS / FORT WORTH  
(BY APPOINTMENT ONLY)  
MCALLEN

October 1, 2021

**Via Regular Mail and CMRR # 70210350**  
**0000 5484 3794**

EDU Trust Services, LLC  
Business Solutions, LLC  
Registered Agent  
7117 US 31 S  
Indianapolis, IN 46227

**Via Regular Mail and CMRR # 7021 0350**  
**0000 5484 3817**

Forge Trust Company  
401 E. 8<sup>th</sup> Street, Suite 222  
Sioux Falls, SD 57103

**Via Regular Mail and CMRR # 7021 0350**  
**0000 5484 3831**

American General Life Insurance Company  
9640 Granite Ridge Drive, Suite 200  
San Diego, CA 92123

**Via Regular Mail and CMRR # 7021 0350**  
**0000 5484 3855**

American General Life Insurance Company  
2710 Gateway Oaks Dr., Suite 150N  
Sacramento, CA 95833

**Via CMRR # 7021 0350 0000 5484 3800 and**  
**e-mail redutax@gmail.com**

Roger Dobrovodsky  
EDU Financial Strategies, LLC  
8355 Rockville Rd # 130  
Indianapolis, IN 46234

**Via Regular Mail and CMRR # 7021 0350**  
**0000 5484 3824**

Forge Trust Company  
P.O. Box 7080  
San Carlos, CA 94070-708

**Via Regular Mail and CMRR # 7021 0350**  
**0000 5484 3848**

American General Life Insurance Company  
c/o Corporation Service Company, Registered  
Agent  
2727 -A Allen Parkway  
Houston, Texas 77019

**Via Regular Mail and CMRR # 7019 1640**  
**0000 6076 3941**

BAWLA & BAWLA, LLC  
Registered Agent for Forge Global  
Corporation  
5314 MacQuarie  
Sugarland, TX 77479

Re: Direction of Maturity Deposit and Proper Registration of other Assets  
(Insurance Policies)  
Transaction No.: 20130531(EDU Trust Services)  
Account No.: 55000318 (EDU Trust Services)  
IRA: 366432  
Policy Code: AG3001548L

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October 1, 2021

Dear Sirs:

We represent David Garrison. The purpose of this letter is to ensure that Mr. Garrison's ownership through his individual retirement account in at least five life insurance policies is properly registered in the name of Forge Trust Company f/b/o David Garrison. Demand is made on each of you to facilitate and accomplish the proper registration of his ownership in these policies with a duly licensed IRA custodian.

Mr. Garrison hired us some months ago to determine the status and ownership of the following life insurance policies which were purchased from funds in his IRA Account:

Insert Chart

Insurance Carrier	Policy Number	Percentage Ownership
American General	Policy No. AG3001548L	0.021459%
Minnesota Life Insurance Company	Policy Code ML2531097	0.021459%
Lincoln National;	Policy Code LN5581096	0.021459%
ING Life Insurance;	Policy Code IN1660748	0.021459%
The Hartford;	Policy Code HLU0189414	0.021459%

In April of 2021, Mr. Garrison received a confirmation of his interests in these five policies from Roger Dobrovodsky at EDU Trust Services, verifying that these policies are still in force. A copy of that correspondence is attached for your ready reference as Exhibit "A".

After much investigation, it appears that these partial ownership interests were never properly registered when they were purchased on February 22, 2013. I enclose for your ready reference the Life Settlement And Purchase Agreement dated February 22, 2013, as Exhibit "B". You will note that Mr. Garrison purchased these policies through his individual retirement account. Assets purchased in an individual retirement must be deposited with a qualified IRA custodian. The original custodian was IRA Trust Services, Co. who we understand was later acquired by Forge Trust Company, a subsidiary of Forge Global.

From the information we have been provided, it appears that these five policies were purchased by EDU Holding Trust and have been titled in the name of an EDU related entity since purchase.

Pursuant to the correspondence dated August 11, 2021, from Roger Dobrovodsky and EDU Trust Services, our Client's IRA account is now due \$102,567.00 from American General

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because the insured under the policy has passed away. A copy of this correspondence is attached as Exhibit "C". This correspondence is our Client's notice to all concerned that these funds should be deposited directly from American General into our Client's IRA # 366432 with his IRA custodian, Forge Trust (f/k/a IRA Trust Services).

Please forward confirmation of the registration of these policies to Forge Trust f/b/o David Garrison. If the policies are not so registered in the name of Forge Trust f/b/o David Garrison, please change the existing registration to make it so, and forward us confirmation of same.

Forge Trust f/k/a IRA Services Trust should be tracking and monitoring our Client's fractional benefit deposit, not EDU Trust Services or any related EDU entity and/or Roger Dobrovodsky. Mr. Garrison does not have a contract with EDU Trust Services, and a review of the IRS list of Nonbank Trustees as of July 1, 2021, indicates that EDU Trust Services is not a qualified IRA Custodian. A copy of this list is attached as Exhibit "D". This correspondence is notice to the four insurance companies copied below to have their policies properly registered pursuant to the attached contract between our Client and Forge Trust f/k/a IRA Trust Services.

A prompt response from all parties is expected within in ten days of the date of this correspondence to avoid any further litigation.

Please call if you have any questions.

Very truly yours,

  
Shari P. Pulman

cc: David Garrison

***Via Regular Mail and CMRR # 7019 1640 0000 6076 3927***

Minnesota Life Insurance Company  
c/o Corp Service Company, Registered Agent  
2345 Rice Street, Suite 230  
Rosedale, Minnesota 55113

***Via Regular Mail and CMRR # 7019 1640 0000 6076 3934***

Lincoln National  
Attn: Dennis R. Glass  
President and Chief Executive Officer  
P.O. Box 21008  
Greensboro, NC 27420

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***Via Regular Mail and CMRR # 7019 1640 0000 6076 3897***

ING Life Insurance

c/o VOYA

Corporation Service Company

d/b/a CSC Lawyers Incorporating Service Company

Registered Agent

211 E. 7<sup>th</sup> Street, Suite 620

Austin, Texas 78701

***Via Regular Mail and CMRR # 7019 1640 0000 6076 3903***

The Hartford

Attn: Mr. Douglas Elliott, President

P.O Box 305033

Nashville, TN 37230

***Via Regular Mail and CMRR # 7019 1640 0000 6076 3910***

Janet Bingham, SDIP

Director of Business Operations

Forge Trust

1160 Industrial Rd.

Suite 1

San Carlos, CA 94070

***Via Regular Mail and CMRR # 7019 1640 0000 6076 3880***

The Hartford

Attn: Mr. Douglas Elliott, President

1 Hartford Plaza

Hartford CT 06155-001